ESD Procurement Procedures at a glance

Earth Sciences Division

Procurement Process

1. End User must ONLY **obtain a quote** from vendor. **SENSITIVE ITEMS:** A justification for procuring a sensitive item must be sent to the Division Computer and Finance Coordinator, Peter Lau for additional Divisional approval.

2. **Create a requisition** - Fill out the ePRO Requisition Worksheet (Form No. EBPT2-1). Email the form with any supporting documentation to one of the three ePRO Inputters: **Valarie Espinoza-Ross**, **Peter Lau**, or **Joyce Pfeiffer**, and CC the PI (and/or the appropriate approver) responsible for the Project ID. The PI will respond to the inputter *ONLY* if there is a question.

3. E-mail will automatically be sent to the approver (PI) for **authorization**. Approver(s) must be on-site (LBNL) to log in and approve/deny the requisition. Note that the "comments" field will only be seen for a denied requisition.

4. A **Distributed Purchasing Unit** will assign an appropriate Buyer.

5. The Buyer is the ONLY PERSON who can make purchases and changes to a procurement. The End User must work with the Buyer NOT with the vendor. Additional approvals may be required and must be documented via email.

6. When your order arrives, **Receiving** will log it into the system before delivery. Receiving will keep the original packing slips and you will be issued and internal LBNL packing slip. It is the End User's responsibility to check the order against this slip/receipt for accuracy.

7. **Returns, repairs, evaluations (changes to the shipment)** must be directed back to the original Buyer. Contact the inputter for any questions regarding your order (incomplete, incorrect, or returns). **DO NOT ship any LBNL property without a LBNL Shipping Document!**

General Approval Process

Remember to discuss your procurements with the appropriate PI and/or Program Head. For any changes in the approval line, please inform the inputter so that it can be documented in the ePRO system comments field or via email.

- Purchases up to $10,000 - Approved by the **PI** of the project ID being charged. In cases when the PI is not available/absent, the *Business Manager* or the appropriate *Program Head* is authorized to approve.

- Purchases >$10,000 but < $50,000 - Approved by the **appropriate Program Head**. In cases when the Program Head is not available/absent, the *Division Director* will approve.

- Purchases >$50,000 - Approved by the **Division Director**. In cases when the Division Director is absent, the Division Director's assigned *designee* will approve.

Because all orders go through a Distributed Purchasing Unit and then assigned to appropriate Buyers, please allow enough time for your order to be processed.

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